

FPT Project	SFA Objective			Performance Outcome	5 Year Performance Plan Action Item	Status As of 6/26/00	End Date 00/00/00
	C	U	E				
	S	C	S				
<b>Financial Partners Process Reengineering</b>							
Reengineering of FP Core Processes ▪ Oversight and Technical Assistance	✓	✓	✓	<ul style="list-style-type: none"> <li>Reduce processing time for key functions</li> <li>Simplify core processes within FP</li> <li>Improve partner involvement and satisfaction with modernization activities</li> </ul>	#51 - Respond to internal audit reports within the timeframe specified.	In Progress	
Reengineering of FP Core Processes ▪ GA/Lender Payment Process ▪ Policy and Analysis ▪ Contract Management	✓	✓	✓	<ul style="list-style-type: none"> <li>Reduce processing time for key functions</li> <li>Simplify core processes within FP</li> <li>Improve partner involvement and satisfaction with modernization activities</li> </ul>	#58 - In cooperation with GAs develop electronic payment/reporting systems - GA/Lender Payment Process.	In Progress	9/00
<b>External Partners Process Reengineering</b>							
Enhanced Partner Relationship Management (CRM)	✓	✓	✓	<ul style="list-style-type: none"> <li>Improve partner satisfaction by proactively seeking their input and reaching out to train and assist partners</li> <li>Provide more consistent and predictable service levels</li> <li>Provide faster and more simplified resolution of inquiries</li> </ul>	<p>#54 – Assign each financial partner a contact point within a customer service team with the know-how and the authority to get questions answered and problems solved.</p> <p>#57 – Partner with current GA and lender groups to develop guiding principles of quality service, training and TA materials, performance data, common standards and operating rules to simplify transactions.</p>	In Progress	<p>#54 – 1/00</p> <p>#57 – 6/00</p>

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Voluntary Flexible Agreements	✓	✓		<ul style="list-style-type: none"> <li>Improved partnership with GA community</li> <li>Improved delivery of aid and program integrity</li> <li>Realization of cost efficiencies</li> </ul>	#62 – Enter into up to 6 VFAs with Gas.	In Progress	6/00
Regulatory Process Improvements	✓	✓	✓	<ul style="list-style-type: none"> <li>Quicker implementation of regulatory mandates</li> <li>Reduced time spent filling out forms</li> <li>Expanded repayment options for financial partners</li> </ul>		In Progress	
Default Reduction Incentives	✓	✓	✓	<ul style="list-style-type: none"> <li>Reduced number of defaults</li> <li>Establish baseline and improved lifetime default rate</li> <li>Regulatory relief for partners in exchange for performance</li> </ul>	#50 – Reduce the lifetime default rate.  #61 – Increase the default recovery rate for loans in default held by Gas.	In Progress	#61 –10/00
Enhanced Monitoring of Financial Partners	✓	✓	✓	<ul style="list-style-type: none"> <li>Provide monitoring capabilities to track and report performance for lenders, guarantors, and state agencies</li> <li>Provide an objective means of monitoring performance</li> <li>Develop Risk Management Model</li> <li>Accurate reporting of portfolio characteristics</li> </ul>	#50 – Identify guarantors and lenders that submit audit reports late and take appropriate action	In Progress	

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Enabling Technology for Financial Partners							
Web Portals for FP	✓	✓	✓	<ul style="list-style-type: none"><li>Lower cost from use of electronic transactions</li><li>Greater access to partner information</li></ul>		In Progress	
Common Third Party Interfacing (Middleware)	✓	✓	✓	<ul style="list-style-type: none"><li>Lower unit cost by exchanging data between third-party entities</li><li>Faster and direct delivery of information</li><li>Improved processing for critical interfaces</li></ul>	#53 - Continue to work with GA's and lenders to maintain the quality of data in NSLDS.  #55 - Give guarantors access to all information in NSLDS subject to Privacy Act considerations and appropriate security measures.	In Progress	#55 – 9/00
Document/Workflow Management		✓	✓	<ul style="list-style-type: none"><li>Lower unit cost through more efficient document handling</li></ul>		In Progress	
Data Warehouse for FP	✓		✓	<ul style="list-style-type: none"><li>Improve identification of information to be collected from target segments to better understand key customer segments.</li><li>Analyze patterns, trends, and gaps in performance and customer opportunity areas</li></ul>	#55 - Give guarantors access to all information in NSLDS subject to Privacy Act considerations and appropriate security measures.	In Progress	9/00
Financial Partners Employee Development							
Financial Partners Employee Development	✓	✓	✓	<ul style="list-style-type: none"><li>Better informed, empowered, and proactive staff</li><li>Increased ability for staff to deliver quality service to partners</li></ul>		In Progress	

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<b>Enhanced Service Delivery for FP</b>							
Expanded FAFSA to Trading Partners'	✓	✓	✓	▪ Faster delivery and processing of FAFSAs		Not Started	
Pilot Electronic Certification (NY Mentor Pin)	✓	✓	✓	▪ Faster processing of key documents (e.g., promissory notes)		Not Started	
E-Commerce Data Exchange	✓	✓	✓	▪ Faster and more reliable invoicing of GA payments	#58 - In cooperation with GAs develop electronic payment/reporting systems.	In Progress	9/00
<b>Cross-Project Efforts</b>							
Financial Partners Transformation Effort	✓		✓	<ul style="list-style-type: none"> <li>▪ Proven project management methodology</li> <li>▪ Increased partner involvement</li> <li>▪ Increased project management capacity of Team Leads and members.</li> </ul>	#56 – Involve our partners in the design of everything that affects them.  #59 – Continuously ask our financial partners “Are we doing a better job as your partner?” and “What can we do next year to improve even more?”  #63b – Within FP develop a project team and management methodology consistent with SFA enterprise-wide tools	In Progress	#56 – 4/00
<b>Other Performance Items not directly addressed by the FP Transformation</b>							
NA				▪ NA	#52 – Create a rapid response team to identify and to address administrative problems.  #63a – Reduce fraudulent death and disability cases below 1998 baseline.	Not Started	#52 – 1/00  #63 –12/99